is teacher essential, cb teacher essential, admin essential

Contact Manager

Contact Manager is a tool all staff can use to:

- track comments/contacts with students and their families.
- note time, focus, and outcomes of any meeting with any student.
- send notifications to specific individuals, regarding specific contacts.

Depending on permissions set, some users will be able to view all contact lists while others will be able to only view the homeroom teacher's/independent study teacher's contacts if they too teach the student.

I. Accessing the Contact Manager

There are 4 ways to access the Contact Manager:

- Method 1. Go to Admin>Student Info>Contact Manager
  -From here, you can see existing Contact Lists and create new ones

- Method 2. Go to Teachers>Contact Manager>Contact Manager
  -From here you will be able to select and view contacts for your rosters (Homeroom, PLS Classes, LC Classes, HQT Classes, SPED, etc.)

- Method 3. From Student Dashboard by clicking on the icon.

- Method 4. From Staff Dashboard by clicking on the icon.

II. Setting Up Vendors

- Step 1. Go to Admin>Website Management> Vendors
  -This is where you will set up vendors so staff that has access to Contact Manager for students can enter information related to the Vendor session with the student(s)

Vendor List Administration

List of Vendors

Vendor Name	Category	County	Edit	View Staff
Math Tutors, Inc.	Tutor	Plumas	Edit	Show Staff: ☐
XYZ Driving School	Vendor Classes	Plumas	Edit	Show Staff: ☐
Occupational Speech Services	Speach Services	Plumas	Edit	Show Staff: ☐
English Tutor ABC	English Tutor	Sierra	Edit	Show Staff: ☐

Add New Vendor | Send Vendors to ReportWriter

Export Vendor List as CSV | After you have edited your Vendor List, you should send them to ReportWriter.
(so that the vendors can appear on the Master Agreement)

- Step 2. Click Add New Vendor and enter all necessary information. Click save.
- Step 3. Check Show Staff box and click Add New Staff to add names of staff providing the vendor services.

Vendor Name	Category	County	Edit	View Staff
Math Tutors, Inc.	Tutor	Plumas	Edit	Show Staff: ☑

Staff Name	Specialist Type	Edit
Caswell, James	Math Tutor	Edit
		Add New Staff

III. Create Contacts for Students

This can be done for individual students, or you can mass create.

Viewing contact list **Barbato, Alexandria (Roster)**, which currently has **7** students in it.

☐ Student		Enroll Start	Enroll Exit	Previous	Contact	Show
☐ Campos, Jordan	[Print]	02/12/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: ☐
☐ Doty, Adrienne	[Print]	02/12/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: ☐
☐ Holmes, Spencer	[Print]	02/12/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: ☐
☐ Howard, Christine	[Print]	02/15/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: ☐
☐ Jackson, Nora	[Print]	02/12/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: ☐
☐ Malaspino, Jessica	[Print]	02/15/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: ☐
☐ Thompson, Katie	[Print]	02/15/2016	Current	Previous Contacts: 1	Contact Now	Show contact information: ☐

Create Contacts For Selected Students

- Step 1. Click on Contact Now to create an individual contact.
  -To assign a contact to multiple students, check the box to the left of the students' names and

click Create Contact for Selected Students

- Step 2. Fill in all relevant information and click Save Contact.

-After the contact is saved, you can return to your roster to view all contacts
-Click the Show Contact Information box to expand and view any contacts made for any student
-Green is a successful contact, blue is a contact that needs follow-up, and pink/red means the contact was unsuccessful
-Contacts may be printed for individual students or a group of selected students

IV. Contact Report

This report is used to view contacts for a specific date range, teacher, student, or vendor staff

- Step 1. Click on the Contact Report tab
- Step 2. Fill in the fields you wish to filter by and click Show Report

V. How to Send Contact Manager Notifications

When creating a contact in Contact Manager, you may send a notification to selected staff members and/or parents of the student, regarding the nature of the contact that is being created.

- Staff notifications will appear on their staff icon in the top right corner of the page
  -The color of the flag indicates the level of importance or priority of notification.

Sending a Notification

- Step 1. Create a contact as described in the steps above
- Step 2. Before saving contact, select type of Notification Flag from the drop down menu. Once the flag is selected, the box will change to the color of the notification flag
- Step 3. Choose staff to send notification to. Click Save

Staff can open their notifications by clicking on the red circle on their staff picture in the top right corner of the page.
-To clear a notification, click the box to the left of the notification and click Mark All Checked Contact Notifications as Read

— *Last Updated by Max Williams on 2016/03/07 23:35*